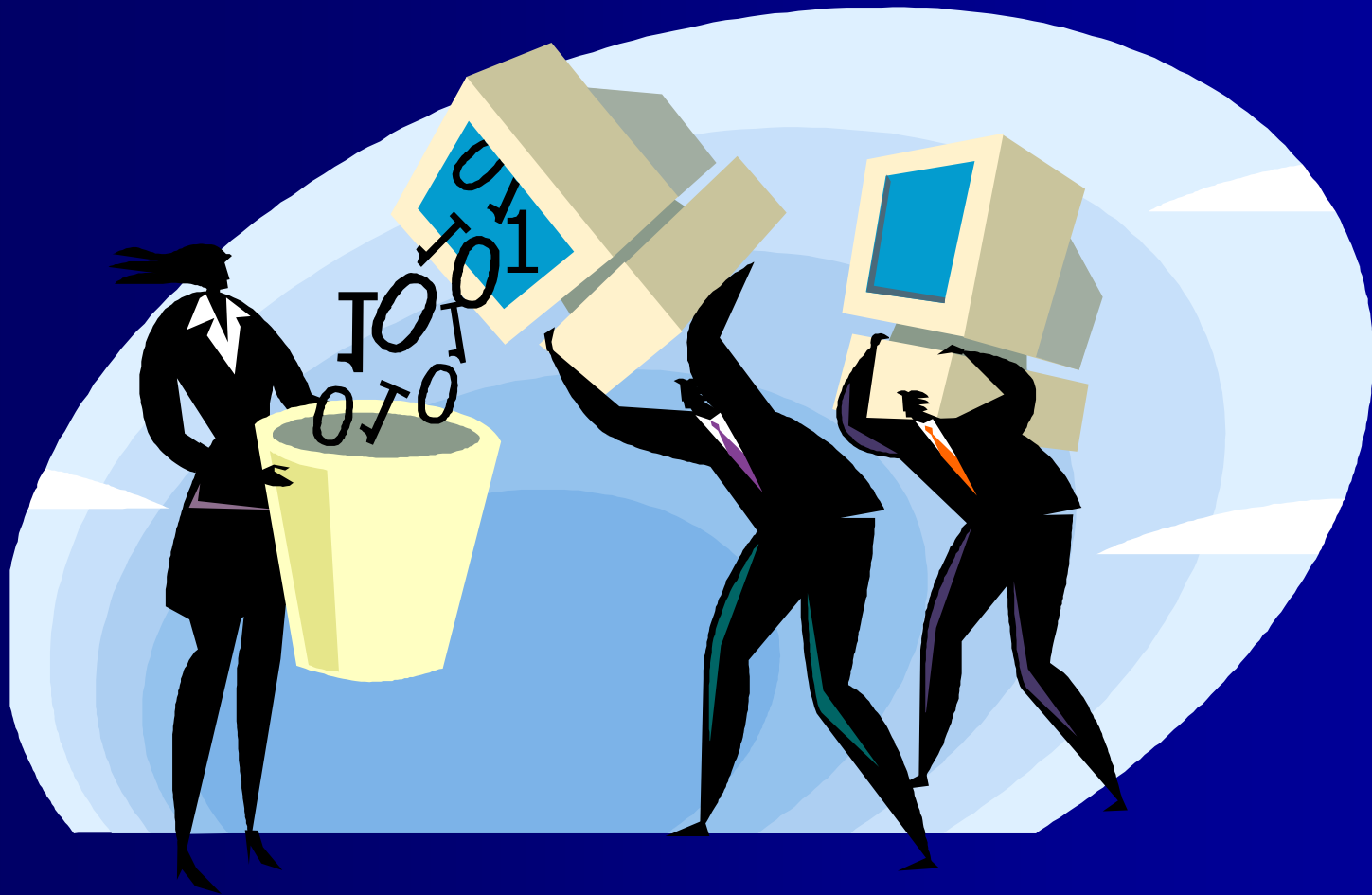


# Data Cleanup & Person Merging



# Case Merge – Day 1

1. Make sure the cases you want to merge are open cases and assigned to you.
2. To merge two cases, the reference person and their individual ID numbers must be the same.
3. Determine which case you want to retain and which case you want to merge into the retained case.
4. On the Case outliner, click on the case name that you want to merge. This will open the Maintain Case Page.
5. On the Maintain Case Page, select Submit Case Closure Request from the options drop down and click 'GO'.
6. On the left hand side of the Case Closure Page and where appropriate, check off the four boxes (Request for Closure, Check Here if Final Safety Assessment is not needed, Check Here if closing checklist is not applicable, and check if completion of Final Family Assessment is not required).

# Case Merge – Day 1

7. On the Closure Summary box, enter a text reason for the case merge.
8. On the right hand side of the Case Closure Page, select the reason of 'merge' from the drop down values and click on the blue 'Merge' hyper link next to the reason box.
9. The case search page will now open. Either type in the case name or case id number that you want to retain and click the Search button.
10. Click on the radio button next to the case you want to retain. Click the continue button.
11. The Case Closure Page will now open and the retained case information will now appear on the bottom of the page. Click Save and then click Close. The merge needs to go through batch processing overnight before Day 2 activities can be completed.

# Case Merge – Day 2

1. On the case's outliner, click on the case name of the case you merged. This will open the Case Maintenance page. Click on the Closing History Tab.
2. On the Closing History Page, in the Case History box, click the 'maintain' hyperlink of the row in which you selected merge. This will open the Case Closure Page.
3. Check the Closure Status under the Closing Information box. If closure was accepted, click on the 'Approve' drop down value under options and click 'GO'.
4. Complete the approval process and submit to your supervisor for approval.
5. Once approved by your supervisor, the cases will merge into one case the night of day two.

**Note:**

If case closure was not accepted, refer to the Closure Denial Report for information regarding issues that may need to be resolved on the case before case closure can be accepted. Once issues have been resolved which prevented the Case Merge, let the merge process run through batch processing overnight again. A new request for Case Merge is not necessary.

# Access Closure Denial Report

Case Closure -- Web Page Dialog

eWiSACWIS

Print Spell Check ABC Help ?

☐ Check Here If Closing Checklist is Not Applicable Closing Checklist:   
☐ Check Here If Completion of Final Family Assessment is not required

Closure Summary

Describe the closure process with the family and service providers and the family's plan for meeting future service needs. Describe how any behaviors or conditions judged to be at a level where safety is not assured or risk of maltreatment is a concern will be managed or sufficiently mitigated by other resources/supports.

Retain Case

Case Name: Case Number: Open Date:

Case Participants

Closure Denial Messages

Closure Denial Messages

Options:  Go

Save Close

https://apps

common/ModalFrame.jsp

Internet

Actions

Safety

Text

Final FA

Closure Summary

Closure Denial Solutions

Closure Denial Report

Done

Internet

# Person Merge

1. Identify the duplicate person ID numbers for the person that needs to be merged. Person ID numbers can be found on the Basic Tab of Person Management.
2. On the Desktop, go up to Utilities > Merge Person. The Merge Person page will open.
3. There are two boxes for the Merge Person page. The first box is Remove Person. There is a Search hyperlink. Click on the hyperlink to search out the person you want to remove. Select the person from the search results to populate the Remove Person box.
4. The second box is the Keep Person box. Use the Search Hyperlink to search for the individual that should be kept. Select the person from the results to populate the Keep Person box.
5. Click on the Save button. A message saying " Are you sure you want to merge these people?" will appear. If you are sure these are the people that need to be merged, click Yes.

# Person Merge

6. A second message will appear. It will say "Merge Record Complete". Click the Close button.
7. The merge record will need to run through batch processing overnight in order for the two records to merge into one record.
8. In order to find out if the person merge passed or failed during the overnight batch processing, from the desktop, go up to Utilities > Person Merge Delete.
9. The Person Merge Delete window appears. If the merge failed or is waiting to go to overnight batch processing, the record will appear on this window. This window will also cancel a person merge (before it was by selecting the delete check box).

# Merge/Closure Batch Run Order

- Case Closure (Merge) then Person Merge.
- Extra day where there is a Reference Person merge in conjunction with a case merge.
- Overnight multiple person merge capability.  
A into B into C
- Overnight multiple case merge functionality.  
1 into 2 into 3



# Person Merge Delete

Person Merge Delete - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

eWiSACWIS

Print Spell Check Help

**Person Merge Delete**

Delete	Submitted By	Date Requested	Remove Person	Keep Person
<input type="checkbox"/>	Cake, Caitlin	11/10/2004	Charly Mia (9221073)	Mia Mia (9221533)
<input type="checkbox"/>	Cake, Caitlin	11/11/2004	Boy Albuquerque (9221543)	Fred Aiden (9220005)
<input type="checkbox"/>	Cake, Caitlin	11/11/2004	April Ash (20839)	Annabel Abby (9218549)

Save Close

Done

Page 2 Sec 1 2/2 At 7.6" Ln 13 Col 4 REC TRK EXT OVR WPH

Internet

# Cleanup Report Distribution

- Report will list duplicate cases by county.
- What data elements do you wish to see?
- Quality of cleanup effort and continued adherence to quality data entry will greatly impact existing and future data integrity.